DOCUMENT RESUME

ED 275 218 HE 019 513

AUTHOR	Carbone, Robert F.
TITLE	An Agenda for Research on Fund Raising.
INSTITUTION	Clearinghouse for Research on Fund Raising, College Park, MD.
SPONS AGENCY	EXXON Education Foundation, New York, N.Y.
PUB DATE	86
NOTE	38p.
AVAILABLE FROM	Clearinghouse for Research on Fund Raising, 3112 Benjamin Building, University of Maryland, College Park, MD 20742 ($5.00).
PUB TYPE	Reports - Descriptive (141)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	Administrators; *Fund Raising; Higher Education; *Institutional Advancement; Philanthropic Foundations; *Private Financial Support; Program Administration; *Research; *School Funds; Staff Role

ABSTRACT

Directions for investigations on fund raising are offered, with particular concern for educational institutions. Excluded from consideration is donor or prospect research. The long-range goal of developing generalizations about fund raising and the importance of having professional researchers do studies on fund raising are briefly addressed. Four broad categories of studies are suggested: reviews of existing research, studies that deal with philanthropy and the philanthropic environment, studies about fund raisers and their professional activities, and studies concerned with the management of fund raising. Specific types of research include: motivational studies of individuals who make charitable gifts, case studies of the impact of fund raising on higher education institutions, task analysis of the work of fund raisers, evaluation studies of the effectiveness of fund raisers, organizational studies of the manner in which fund-raising efforts are structured and managed, content analysis of materials written and produced to support fund raising, policy studies of government and institutional regulations that affect fund raising, and application of market research techniques to fund raising. Appended is Harvey K. Jacobson's article, "Toward a Network: Problems and Opportunities in Fund Raising Research." (SW)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED275218

An Agenda for Research on Fund Raising

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☑ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

By Robert F. Carbone

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Robert F. Carbone

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

HE 019 513

An Agenda for Research on Fund Raising

By Robert F. Carbone

Clearinghouse for Research on Fund Raising

3112 Benjamin Building
The University of Maryland College Park
College Park, MD 20742

The Clearinghouse for Research on Fund Raising collects and abstracts theses, dissertations, and other research studies on fund raising and related institutional advancement activities. Researchers are encouraged to submit reports of relevant studies.

Contents

Acknowledgments		5
Foreword	Robert L. Payton, President Exxon Education Foundation	7
Participants	Research on Fund Raising Seminar	14
Part I	**Research on Fund Raising**	
	Fund Raising as a Codeword	20
	Not Prospect Research	20
	Research and Professionalism	20
	The Need for Predictive Generalizations	22
	Who Should Do the Research	23
Part II	**The Agenda for Research on Fund Raising**	
	Reviews of Existing Research	26
	The Philanthropic Environment	27
	The Work and Careers of Fund Raisers	29
	The Management of Fund Raising	31
Appendix	Toward a Network: Problems and Opportunities in Fund Raising Research Harvey O. Jacobson	37

Funds for the preparation of this monograph
were provided by the Exxon Education Foundation

Joint sponsors of the project titled *Research on Fund Raising and the Professional Development of Fund Raising Personnel* which produced this monograph are

Department of Education Policy, Planning, and Administration
Donald R. Warren, Chairman

and

Institute for Research on Higher and Adult Education
Robert O. Berdahl, Director

The University of Maryland College Park

© 1986 by Robert F. Carbone

Printed in the United States of America

Acknowledgments

Much of the credit for stimulating current interest in research on fund raising must go to Robert L. Payton, President of the Exxon Education Foundation. His annual reports, speeches, and articles have repeatedly called for more substantive knowledge as a prerequisite to increased professionalism of fund raisers.

President Payton's writings prompted me to seek funding for a project, the first phase of which is the publication of this research agenda. I am grateful to him and to his colleagues at the foundation this support.

Encouragement in this effort from my chairman, Donald R. Warren, and from my colleague, Robert O. Berdahl, is also acknowledged. The support, both logistic and moral, by the academic department and research institute that cosponsored this project has been unstinting.

Each participant in the invitational seminar held in June 1985 made a substantive contribution to this agenda. I thank them for their time, their insights, and for agreeing to travel to Washington at their own expense. This is clearly indicative of the widespread interest that research on fund raising currently elicits.

Special contributions in the form of seminar papers were made by Harvey Jacobson, Jeff Paton, Bill Pickett, and Wes Rowland. Much of the substance of this effort is attributable to their collective experience and wisdom. Professor Jacobson generously agreed to have his paper included as an appendix to this monograph and thus he deserves added thanks. Useful reports summarizing discussions at the seminar were written by David Jones, Elizabeth Palter, Ray Rowland, and Terry Schavone. Each of these individuals deserves special recognition. Thanks are due also to John Leslie for his helpful comments on the manuscript.

To my research assistant, Paulette Moore, and to my secretary, Susan Pelter, I extend my gratitude for their good work in helping to create this publication.

It should be obvious that I cannot take credit for all the ideas reported here. I do, however, take responsibility for the manner in which they are organized and explicated.

Robert F. Carbone
College Park, MD
April 1986

Foreword

by Robert L. Payton
President, Exxon Education Foundation

(In June 1985 a day-long seminar was held in Washington, D.C. to discuss needed research on fund raising and associated institutional advancement activities. Participants included thirty-six development officers, scholars, consultants, foundation directors, and association executives. Keynote remarks at the seminar were delivered by Robert L. Payton, President of the Exxon Education Foundation. They are printed here, with his permission, because they provide an appropriate introduction to what follows in this monograph.)

Last year I asked the newcomers to educational advancement at the annual summer workshop at Dartmouth whether they think of themselves as salesmen, technicians, bureaucrats, or professionals.

It occurs to me to ask the participants in this research seminar whether *you* think of *yourselves* as salesmen, technicians, bureaucrats, professionals—or scholars.

Wes Rowland suggests, in his paper prepared for this seminar, that to be a professional is to be a scholar, at least in part. Most of the

fund raising literature, on the other hand, seems aimed not at professionals but at technicians and salesmen. Most of the occupational titles represented in this meeting are either linked to *development* or *university relations*. Only a few participants seem to be engaged on a full-time basis in research. Should we accept Rowland's view that "research is one of the key benchmarks of a profession"?

On that basis, I reduce the labels by one, and ask you the same question that I ask the newcomers: are you salesmen, technicians, bureaucrats, or professionals? The courteous thing for me to do is to assume that you are professionals, but based on these distinctions:

- Salesmen are indifferent to the products or services they sell.
- Technicians are also indifferent to purpose, but focus instead on process and technique. They tend to know everything about a subject except what it is for.
- Bureaucrats are rule-driven people, people who lack the judgment or who lack the autonomy to exercise judgment.

What, then, are professionals?

One of the first pieces of "research" that should be done in this field is to sort out the kinds of things people like us actually *do*: the degree of technical competence they have; the degree of autonomy they are given to carry out their objectives; the standards of performance they are expected to meet, and how those are formulated; the kinds of organizations they work for; the boundaries between their responsibilities and the duties of others; the methods of persuasion they use to achieve their purposes; their relations with peers beyond their own organizations.

In many corporations, people who might be thought of as professional are grouped as "executives," whether "managerial," "professional," or "technical." Professionals are more narrowly specialized, by that usage, than are managerial personnel. Managers are readily transferred from one function to another; professionals less so; technical personnel hardly at all.

How many development or university relations people move across functions into academic administration, say, or into the business office? How many teach? How many do serious research?

My first point is that we should help individuals entering this field to clarify in their own minds what is expected of them. If we are going to use terms like professional, we should seek some consensus about what we mean by it. If it presumes some practice of scholar-

ship, we should be able to point to examples of that scholarship. If it presumes some development of research as well as its use, then we should show how that aspect of professionalism relates to other responsibilities.

We should not raise false expectations, and we should not simply use *professional* as a label to enhance our sense of self-importance.

My second point also grows out of reading the papers that have been prepared for this meeting. This point is also in the form of a question; it is implicit in my use of two terms, *scholarship* and *research* as if they were distinct modes of inquiry.

All I will say here is that *people working in this field must face the same troubling issues that have confronted social science research everywhere*. Social science has been found wanting as science; it is now seeking a new accommodation with the humanities. I suggest that you read the recent collection of essays by the influential anthropologist and social scientist Clifford Geertz entitled *Local Knowledge*. (I have attached some other suggestions of fairly typical discussion of these issues; Geertz is merely the most recent culmination of that line of reflection.)

An example of that kind of inquiry in action can be found in a book that also has as its topic the idea of professionalism: *Professions and Professional Ideologies in America*, edited by Gerald Geison. There has been abundant and influential study of professionalism in the past decade; someone will do us all a great service in putting together a synthesis and interpretation of that work and its implications for our own work.

The first point is that we should better understand what we mean when we speak of our work as professional; my second point is that our mode of inquiry will have to go beyond the social science of the 1960s and take on depth, subtlety, and a richness of understanding that can't be found in accumulations of data and slipshod analysis of the kind Jeff Paton warns us about in the paper he wrote for this seminar.

My third point has to do with the kinds of scholarship we might best pursue. A group of young British scientists published an *Encyclopedia of Ignorance* a few years ago, identifying those things we don't yet know that seem just beyond what we *do* think we know. Perhaps we should prepare something of the sort ourselves.

My guess is that we would know quite a bit about technical things: how to use direct mail, how to develop a management information

system, how to train volunteers for a telephone campaign, how to organize the development committee of a board.

What we don't know is why we do things the way we do when the rest of the world does not. Wes Rowland's list of questions includes one or two on the rationale for corporate support of education. You might read the recent book by Franklin Gamwell, *Beyond Preference*, which talks about the philosophy of association as interpreted by Milton Friedman and John Dewey and others. And of course you have already read James Douglas's *Why Charity? The Rationale for a Third Sector*, and know about the limitations of the marketplace and of government and the theoretical framework for voluntary service, voluntary association, and voluntary giving.

My fourth point is very much in my mind these days. I *am troubled by our preoccupation with money*—with our focus either on fund raising or on grantmaking, as if *money* were the most important element of the philanthropic tradition. When we study the philanthropic tradition we find three dimensions: people with ideas, with vision, with a sense of mission; those people then joined by other people who have been persuaded to share that vision, to become organized in a effort to implement it, to build or make something that will advance the cause; and then—sometimes *only* then—does the marshalling of resources come into play.

The marshalling of resources often puts voluntary giving and fund raising in a different perspective. Many organizations are dependent only *marginally* on resources generated by voluntary giving. Their primary support comes from tuition income, income from auxiliary enterprises, fees for various special services, allocations from government agencies, and contracts for research and other services. The point should not have to be made here that voluntary giving is only a part, often only a small part, of the success of the ongoing enterprise.

These four points might come together in a form that I urge upon you for consideration. *We need to embark on development of case studies of "philanthropy in action."* The first thing someone should do is to set about preparing the philanthropic history of the principal social causes and movements of the 20th century. One example of this is the work of Robert Bremner, the Ohio State historian, who has contributed so much to our understanding of American philanthropy. His essay in Independent Sector's collection entitled *Working Papers*, published for its 1985 research conference, is on "Advocacy and Empowerment Movements in Philanthropy Since 1960." The role of

academic intellectuals and academic institutions in that process may justify special attention by some of us who don't usually think of our work in such terms.

We are working on a series of what I hope might become prototypes of such case studies: the Columbia Seminar on Philanthropy will soon be engaged in a year-long consideration of philanthropy in action as seen in the Ethiopian crisis. I am discussing with another group the possibility of a study in depth of the philanthropic role in controlling nuclear weapons, and with a third group a study of the impact of ethnic change on democratic values. Other studies we have sketched out will deal with philanthropy in action in Central America, to understand better how nonprofit influences affect foreign policy; with the tragic circumstances of so-called derelict populations and other homeless in American cities; and with an examination of the dynamic of the arts in the development of a Lincoln Center-kind of complex.

We do not propose in this process to become expert on Ethiopian culture and politics or on nuclear weapons technology and strategy or these other topics. In fact, the challenge will be to avoid becoming immersed in the other aspects of those topics and to seek in such case studies instead a sort of *Rules of Philanthropic Method*, to adapt a title from Durkheim. What are the issues, values, methods, rationales, motivations of philanthropy in its various manifestations?

We will find, I am convinced, a mixed bag of motivations and ideals, more examples of high aspiration and low technique. We will find corruption and unseemly ambition as well as self-sacrifice and self-discipline; brilliant success and tragic failure. In time, our understanding as we pass it on to others will better reflect our personal experience, better inform our action.

When we reach that point, then we can start talking seriously about ourselves as reflective practitioners, as professionals—in the best sense of the word.

Some Informal Bibliographical Notes

Mentioned in the text:

Clifford Geertz, *Local Knowledge*, Basic Books, 1983. Chapter one, "Blurred Genres," is most germane to my remarks in this paper.

Gerald L. Geison, editor, *Professions and Professional Ideologies in America*, University of North Carolina Press, 1983. Geison's introduction is masterful; the essay by Donald M. Scott on public lecturing as "the vanished profession" is suggestive when thinking about some of the smaller visions of philanthropy.

James Douglas, *Why Charity? The Case for a Third Sector*, Sage Publications, 1983. The only book of its kind, as far as I know.

Ronald Duncan and Miranda Weston-Smith, *The Encyclopedia of Ignorance*, Pergamon Press (London), 1977. The same editors have also produced a subsequent volume, *The Encyclopedia of Delusions*, Pergamon Press (London) 1979 (Simon and Schuster, Wallaby Books, 1981).

Virginia A. Hodgkinson, editor, *Working Papers*, 1985 Research Forum, Independent Sector. A collection of 21 papers in 545 pages, including Robert Bremner on advocacy movements and philanthropy.

Some other related items you might find interesting:

Robert A. Scott and Arnold R. Shore, *Why Sociology Does Not Apply*, Elsevier, 1979. Representative of many recent works on some of the limitations of social science (and co-authored by my colleague Arnold Shore at Exxon Education Foundation).

Charles E. Lindblom and David K. Cohen, *Usable Knowledge: Social Science and Social Problem Solving*, Yale University Press, 1979. The summary of "professional social inquiry" on pages eight and nine is worth examining in terms of your own research ambitions.

Milton M. Gordon, *Human Nature, Class, and Ethnicity*, Oxford University Press, 1978. The first two chapters are useful summaries of sociological thought and of a carefully argued social science perspective.

Thorstein Veblen, *The Higher Learning in America: A Memorandum on the Conduct of Universities by Business Men* (1918), Sagamore Press, 1957. An extraordinarily enduring diatribe, revealing values still widely shared in the academy. We know his bias; how good was his observation?

Merle Curti and Roderick Nash, *Philanthropy in the Shaping of American Higher Education*, Rutgers University Press, 1965—now out of print. Essential reading, an insight into how rich a study the study of philanthropy in action might become.

Donald Schon, *The Reflective Practitioner*, Basic Books, 1983. A very thoughtful discussion of the professional in action.

Robert A. Dahl, *A Preface to Economic Democracy*, University of California Press, 1985. A book that advances a theory likely to be given much credence in the philanthropic world and that sharpens some of the distinctions between the markeplace and the nonprofit association.

Edward Shils, *Tradition*, University of Chicago Press, 1981. If philanthropy is a tradition, then this is the book to measure it against. A wonderfully rich and (I hope) important work.

Judith N. Shklar, *Ordinary Vices*, Harvard University Press, 1984. They are, in order: Cruelty, Hypocrisy, Snobbery, Betrayal, and Misanthropy. Who will write *Ordinary Virtues*? (I hope Shklar does.)

Participants
Research on Fund Raising Seminar

The persons listed below gathered in Washington, D.C. in June 1985 to discuss research on fund raising. Much of the data found in this monograph derives from this seminar.

To stimulate participants' thinking about research needs, four advance papers were commissioned. Authors of these papers are Harvey K. Jacobson (University of Wisconsin-Oshkosh), G. Jeffry Paton (University of Rochester), William L. Pickett (University of San Diego), and A. Westley Rowland (SUNY-Buffalo, now retired). Each author also served as discussion leader for a small group session at the seminar.

Four other papers were produced following the seminar in an effort to record and summarize the research ideas that emerged. Authors of these papers are David R. Jones (then at Vanderbilt and now with the National Trust for Historic Preservation), Elizabeth S. Palter (Pennsylvania State University), H. Ray Rowland (St. Cloud State University), and P. Terry Schavone (Catholic University).

Seminar participants were:

Edward Allenby
University of Delaware

Robert Ashton
The University of Maryland Foundation

Nancy M. Berry
National Executive Service Corps

Elizabeth Boris
Council on Foundations

Kenneth Burke
The Johns Hopkins University

Joseph Dean
Samford University

Richard Edwards
Council for the Advancement and Support of Education

Jack G. Ellis
The Ohio University Fund, Inc,.

Allyn Enderlyn
National Future Homemakers of America Foundation, Inc.

Raymond E. Fenwick
Northern Virginia Community College Foundation, Inc.

Arthur C. Frantzreb
Consultant in Philanthropy

Robert Gale
Association of Governing Boards of Universities and Colleges

Margarete Hall
The University of Maryland College Park

Harvey K. Jacobson
University of Wisconsin, Oshkosh

Warren Heeman
Georgia Institute of Technology

David R. Jones
Vanderbilt University

Vivienne Lee
Council for the Advancement and Support of Education

Donald Lemish
Longwood College

John W. Leslie
Fund-Raising Counsel

Diedre A. Ling
University of Massachusetts at Amherst

Lilli Milder
Coalition for Advancement of Private Higher Education

Mary Kay Murphy
Georgia Institute of Technology

Elizabeth Palter
Roger Williams College

G. Jeffry Paton
University of Rochester

William L. Pickett
University of San Diego

Philip Ringle
Essex Community College

A. Westley Rowland
SUNY-Buffalo

H. Ray Rowland
St. Cloud State University

P. Terry Schavone
Catholic University

John J. Schwartz
American Association of Fund Raising Counsel, Inc.

Virginia Carter Smith
Council for the Advancement and Support of Education

David Thompson
Thompson and Pendel Associates

Lloyd Trinklein
Shippensburg University

J. Richard Wilson
National Society of Fund Raising Executives

Michael Worth
George Washington University

Dennis Young
SUNY-Stony Brook

Clearinghouse for Research on Fund Raising

While numerous research studies have examined fund raising and related institutional advancement topics, there exists no central repository for such studies. The Clearinghouse for Research on Fund Raising was established to meet this need. It collects and abstracts relevant research and periodically issues reports summarizing this research.

Researchers are invited to provide the Clearinghouse reports of research projects dealing with fund raising, institutional advancement, and closely related topics. Complete reports, summaries, or articles based on the research will be gratefully received. They should be sent to:

The Clearinghouse for Research on Fund Raising

University of Maryland
3112 Benjamin Building
College Park, MD 20742

Part I

Research on Fund Raising

Introduction

It has been said that education is a process of moving from cocksure ignorance to, at least, thoughtful uncertainty. Some years ago, being in possession of more of the former than of the latter, I created a course on the fundamentals of fund raising.

My education about fund raising, achieved in large measure through teaching the course, has slowly lead me toward a state of thoughtful uncertainty about this increasingly important field of endeavor. Quite simply, I realized we need to know more about fund raising as a vocation and about the growing cadre of people and institutions it touches—donors, grantmakers, fund raisers, and those who benefit from the funds raised.

What is written here is intended to serve that purpose.

As a university professor, I am primarily concerned with fund raising for educational institutions. It would be disappointing, however, if what is contained in this monograph also did not have relevance for all other nonprofit and philanthropic organizations. My hope is that it does.

Fund Raising as a Codeword

The term "fund raising", as it is used here, is in reality a codeword for a much larger set of concepts, programs, and activities associated with the somewhat uniquely American penchant for translating private resources into the public good. It means (in ascending order of magnitude) everything we have come to associate with terms like "solicitation" and "development" and "institutional advancement" and "philanthropy". It encompasses the work of those who actually raise funds, but also of those who write and edit publications, handle institutional relations, direct alumni and parent programs, manage institutional foundations, or govern and administer or teach in educational institutions.

Further, fund raising as it is used in this report most certainly includes people of wealth who give of their resources, people of influence who volunteer their time and energy in the fund raising process, and people whose minds and lives are enhanced because funds are raised. Nor does this codeword exclude individuals who advise fund raisers, who manage the affairs of grantmaking and philanthropic organizations, or who are associated with professional societies and organizations in the world of philanthropy and fund raising.

Fund raising, used in this broad sense, is the frame of reference for what follows.

Not Prospect Research

There are at least two kinds of research associated with fund raising. For that reason, a few words are needed to make clear just what form of research is *not* of concern here. This monograph does not address the matter of donor or prospect research. That interesting and important aspect of fund raising is covered adequately elsewhere.

These pages do discuss research *about* fund raising. If you are interested in studies about philanthropy, ways of garnering philanthropic support, and the people associated with these endeavors, read on.

Research and Professionalism

In the extensive literature on professions, there is a noticeable lack of agreement on what is meant when the term "profession" is used.

Indeed, said one observer, to attempt a definition is to invite controversy.

Practitioners of many vocations reflect this state of uncertainty. This is especially true of vocations which, for the lack of licensure, formal training programs, ethical codes, or public acceptance (to name but a few trappings of a profession), are not yet considered to be elite occupations. Such uncertainty is readily apparent among fund raisers.

Categorizing vocations as either professional or nonprofessional is something of a useless venture, however. A more productive approach is to ascertain the level of professionalization that any occupation may have attained at any given time.

One criterion used for this purpose is the body of information and theory comprising the field's knowledge base. Another is the degree to which theoretical knowledge is used by practitioners to deal competently with problems encountered in their activities.

When issues of knowledge—especially theoretical knowledge—are raised, it is natural to begin thinking about research. The business of research, after all, is production of new knowledge and evolution of theory. In turn, theory will assist in organizing empirically derived information, in framing further research, and in guiding decisions about what needs to be accomplished.

The field of fund raising has an enormous body of lore and experience, and even a modest amount of research findings. Its fund of theoretical knowledge, however, is limited. G. Jeffry Paton, in his seminar paper later published in *Fund Raising Management* (October 1985), makes the point in dramatic fashion. He wrote:

> Applied research efforts conducted by professional practitioners understandably reflect relatively practical motivations in lieu of preoccupation with comprehensive conceptual bases or theoretical perspectives. The slow progress of research about development performance is at least partially a consequence of relying on readily available empirical evidence rather than unifying theoretical and conceptual bases to guide the course of inquiry. Some of the reported research does not contribute to a cumulative improvement of knowledge and understanding about development performance so much as it produces an accumulating store of potentially relevant but diffuse findings and bits and pieces of information.

There can be little doubt that movement of fund raising along the continuum of professionalization is, to no small degree, regulated by the depth of theoretical knowledge associated with this vocation.

The Need for Predictive Generalizations

Given the structure of knowledge about fund raising, it seems evident that general theories are not available for the guidance of fund raising practitioners. Perhaps it is more realistic to ask: Do we have *predictive generalizations* that permit us to solve problems—that is, raise money—in a competent manner? If so, how broad are these generalizations—that is, how much confidence can be placed in them?

(It is necessary to interject here that this discussion of predictive generalizations draws heavily on an unpublished manuscript given to me by the late James Bryant Conant, with whom I was associated many years ago.)

To illustrate the importance of having confidence in the generalizations used by professionals, Mr. Conant wrote of the doctor who treated George Washington shortly before our first president's death. Bleeding patients, suggested a generalization for medical practice widely accepted at that time, would cure disease. Washington was ill; he was bled; he died. Clearly, serious consequences can ensue from relying on predictive generalizations, especially if they are narrow or wrong.

Over time, practitioners in a field—fund raising, for example—evolve general rules which can be guides to future action. We know that if you do "A" and "B", the result will probably be "C". These can be called "empirical rules" or "highly limited generalizations" since they are clearly not general theories or laws.

As a body of knowledge in a field grows, more general principles—that is, broader generalizations—are developed. Then it can be claimed that a theoretical component has been added to the field.

Another way of saying this is that when the theoretical component of a field is small, generalizations available for use by practitioners do not provide the certainty of prediction that is found in a field where the generalizations are broad. There is high certainty that combustion will produce carbon dioxide, for example. There is somewhat less certainty that soliciting an alumnus will produce dollars, to pick a somewhat extreme contrary example.

The long-range goal of researchers interested in fund raising, then, should be to increase the theoretical component of the field. This can be done by repeatedly testing the narrow generalizations derived from practice in an effort to broaden their predictive power.

Research is the only means through which this can be accomplished. Up to now, however, research on fund raising has been sporadic,

20

scatter-gun, and often pedestrian. Perhaps by laying out a broad research agenda, it will be possible to increase the quantity and improve the quality of research in this field.

As the aspiration expressed here is realized—and there is no unassailable reason why it cannot be realized—movement of fund raising along the professionalization continuum will be accelerated.

Who Should Do the Research?

If it is agreed that professional stature is associated, in no small way, with the breadth of knowledge and theory that guides practice in a professional field, it follows that more substantive research should be conducted. At issue, however, is determining who shall do the research. Equally important is the question of how these research studies will be funded. Also, it can be asked who will supply the data for these studies?

At the risk of offending some who make their livings in the fund raising field, it seems evident that serious research on fund raising should *not* be conducted by practicing fund raisers or by those in related institutional advancement areas. Two compelling reasons support this view.

First, few fund raising practitioners have the time to do substantive research. "The desire is there," said one contributor to this monograph, but

> I can very much appreciate the reasons why extensive research in higher education fund raising has not been carried out. Very simply, no time. Our time is monopolized, broken up, scattered . . .

Exceptions, of course, are found in those fund raisers who earn a graduate degree while continuing to work in the development office. But after completing a thesis or dissertation—and there have been some excellent examples of substantive research conducted by these practitioner/graduate students—job obligations loom large. Rightfully so. Earning the degree may result in a promotion or career change, or maybe some career corners had to be cut while juggling degree requirements and a full-time job.

A second argument against fund raisers doing research is simply that most practitioners in the field have not been trained as researchers. Many have no advanced degree and many fund raisers who complete graduate study do so in fields where methods are inappropriate or where methodological requirements are extremely modest.

Who, then, will do the research on fund raising? Professors in the academic departments on your campus and, of course, their graduate students are the most obvious producers of this research. There are, after all, nearly a hundred programs on higher education administration in American universities. Most universities have schools of business, public administration programs, and journalism departments. In recent years a number of excellent programs on nonprofit organization management have emerged.

A few academicians are already conducting studies relevant to the field of fund raising. Others can be encouraged to do so. Providing this encouragement is a task that fund raising practitioners can and should accept. Three ways of doing so are suggested.

Getting better acquainted with faculty members is a good start. Many professors and almost all graduate students are eager to hear about promising research questions. Sharing with them a copy of this research agenda may stimulate thinking about what their disciplines can contribute to our understanding of philanthropy and fund raising.

Helping professors and graduate students fund their research would be a major stimulus. It is amazing how research interests turn toward sources of available support. A donor who wants to support research may find research on fund raising an enticing notion. Your foundation board or your trustees might welcome the suggestion that some of the funds you raise could support studies on fund raising itself.

Contributing data to studies is a third way fund raisers can enhance the knowledge base of this field. When researchers ask for information, make it available. Respond to questionnaires; agree to be interviewed; share your files and your data bases. The quality of research often depends on the quality of the subjects who participate. You can, in that way, become an active partner in the research effort.

Research on fund raising, then, is best left to those with requisite time and skills. Practitioners can encourage needed studies, help fund them, and provide data. Such cooperative ventures will yield substantive scholarship and in turn hasten fund raising toward its professional destiny.

Part II

The Agenda for Research on Fund Raising

There are literally hundreds, perhaps thousands, of research studies yet to be done as we seek to learn more about the many facets of fund raising. What follows is an attempt to identify and organize *some* of the questions in need of investigation.

This catalog of research suggestions is the distillation of what a group of knowledgeable and experienced fund raisers say is important. Its purpose is to provoke and motivate scholars, both neophyte and seasoned, to take up the task.

To be sure, some research on questions similar or identical to those set out in this agenda is already underway on our nation's campuses or under auspices of organizations like Independent Sector or the Council on Foundations. The point is, more such research needs to be done.

Neither can this set of research questions be considered all inclusive. Of course there are other issues worthy of investigation and other questions that must be answered. At best, the agenda offered here is a first attempt to set some directions for investigators interested in fund raising. If it does, the purposes of this monograph will be realized.

Thoughtful readers of these pages will undoubtedly ask, which of these studies should be done first? What are the priorities?

It is a fair question. Unfortunately, it is a question that is difficult, perhaps impossible, to answer. Priorities are a function of the role a given person in the field plays. Practicing development officers are likely to emphasize questions that foundation executives might place well down on the list. For that reason, only a modest organizational scheme, but no system of priorities, has been applied to the list of questions.

Four broad categories of studies are suggested: Reviews of existing research, studies that deal with philanthropy and the philanthropic environment, studies about fund raisers and their professional activities, and studies concerned with the management of fund raising.

Reviews of Existing Research

One extremely useful scholarly activity in any field of inquiry is the task of identifying, summarizing, and drawing conclusions from extant research studies. Suggestions for such reports begins the research agenda.

Reviews of existing research on fund raising and related activities:

What principles, generalizations, and trends emerge from summaries and analyses of the body of previously conducted research in this field? Reviews might address various sub-topics, such as

— motives for giving and the concept of philanthropy
— characteristics of donors and the relationship of these characteristics to level and rate of giving
— characteristics of institutions and the relationship of these characteristics to attainment of gifts
— effectiveness of various fund raising techniques with attention to institutional and regional differences.

The Philanthropic Environment

Case studies of philanthropic organizations, especially those that support institutions of higher education:

What characterizes the independent, corporate, and community foundations in a given city, metropolitan area, region, state, or section of the nation? What are their missions, philosophies of giving, funding priorities, funding history? How are they governed and administered? How are they staffed and what are their procedures for receiving and acting on funding proposals? What is the composition of their boards and how are board members selected? What is the background of staff and how are they selected? What are the attitudes of board members about social and educational issues? What kind of projects are funded under staff discretionary authority? Do these differ from projects funded by board decision?

Motivational studies of individuals who make charitable gifts to identify factors that prompt philanthropic behavior:

To what extent is giving associated with attainment of tax advantages? Desire to perpetuate own or family name? Pure altruism? Guilt or fear? Spiritual, religious, or moral values? Peer pressure or desire to comply with accepted social norms? Maintaining social status? Ego gratification? Self-actualization? Perpetuation of personal goals? Gratitude? Is there a "life cycle" associated with giving that reflects important transitions in the life of donors? What factors are associated with "donor loss" or with erratic giving patterns of donors?

Analytical studies about the nature of philanthropy:

What are the philosophical roots of philanthropy? From what elements of human experience, over time and from various cultures, do these philosophical roots spring? How is the philosophy of philanthropy related to religious precepts? What, if any, philanthropic roots derive uniquely from the Judeo-Christian heritage? What concepts and practices from other religious traditions in the world contribute to the philosophy of philanthropy? How do concepts of philanthropy differ among various religious groups? What are the ethnic influences of philanthropy? Does the concept of philanthropy differ among ethnic groups that share the same religious heritage? What are the philanthropic attitudes of persons who disavow specific religious beliefs? From what historical, cultural, or philosophical roots do the philan-

thropic concepts of nonbelievers stem? What attitudes and behaviors constitute the intrinsic elements of a charitable act? How are these attitudes and behaviors acquired? Can they be learned? How are they transmitted to succeeding generations?

Behavioral studies of donors and nondonors:

Why do some people give regularly while others give infrequently or not at all? Is the donor's pattern of giving (or lack of giving) related to some fundamental psychological trait(s), or is it a result of experiences associated with the institution that seeks a gift? Is giving or a donor's pattern of giving related to some identifiable personality typology? To what extent do various types of solicitations (e.g., printed material/letters as opposed to telephone/personal contact) influence the giving response of a prospective donor?

Sociological studies of philanthropy in America:

What are the socio-cultural determinants of the American philanthropic tradition? What societal influences have molded and changed our views on philanthropy over time? What is the relationship between American philanthropic behavior and major events and eras (e.g., world wars, depressions, technological advances, etc.) in our national experience? What, if any, changes have occurred in philanthropic behavior of Americans since the advent of "supply side" economics and reductions in federal government emphasis on human services programs?

Biographical studies of individuals who have had significant involvement in philanthropy:

What insights about fund raising and about philanthropy are suggested by examination of the lives and careers of men and women active in philanthropic affairs? Biographies might be written about—

- —persons of wealth who make substantial gifts to educational institutions
- —persons of influence who assist institutions in attracting gifts
- —fund raisers and consultants who have been successful in designing and managing fund raising efforts
- —grantmakers who have guided the philanthropic directions of community, independent, and corporate foundations.

Case studies of the impact of fund raising on institutions of higher education:

How are institutional priorities and procedures affected by philanthropy? What occurs when an institution first initiates a fund raising effort? When a small institution receives a single major gift, what happens? How does a major gift impact other raising efforts? What occurs after an institution completes a successful (or an unsuccessful) capital campaign?

The Work and Careers of Fund Raisers

Role perception and role definition studies of individuals involved in fund raising and philanthropic activity:

How do the principal actors in fund raising and philanthropy perceive their various roles? How do they perceive the roles of those with whom they interact? Are these perceptions of roles consistent with or in conflict with formal definitions of roles and responsibilities as contained in job descriptions or policy manuals? Are role perceptions and definitions related to institutional characteristics? Studies of role perception and definition might be made of—

- — Institutional fund raisers and other advancement personnel
- — trustees and other volunteer leadership
- — presidents, deans, and faculty members
- — grantmakers, major donors, and donors of more modest gifts

Motivational studies of volunteers and documentation of their involvement in fund raising activities:

What are the demographic and psychological characteristics of volunteer leaders and workers in fund raising programs? What motivates them to volunteer? What roles do they play in various fund raising programs? How do these roles vary according to type and size of institution? What geographic differences exist? How do institutions identify and train volunteers? What measures are used in determining effectiveness of volunteers? What techniques are used in channeling volunteer effort to appropriate levels and types of activities?

Studies of compensation of fund raising officers:

How do salaries of fund raising officers compare to salaries of persons with equivalent qualifications who hold positions of similar levels in institutions of higher education? How do they compare with fund raisers with equivalent qualifications in other nonprofit organizations? How do they compare with salaries of grantmakers in foundations and corporations? How do salaries relate to size and type of institution? Are there geographic differences in salaries by type and size of institution? Are there differentials in salaries between male and female fund raisers at comparable levels of responsibility? To what extent are incentive plans (additional salary, fringe benefits, bonuses, etc.) utilized by institutions of higher education? What are the attitudes of institutional administrators, fund raisers, trustees, and donors regarding such incentive plans?

Psychological studies of fund raisers:

What, if any, patterns of beliefs, attitudes, and values do fund raisers exhibit? How are these beliefs, attitudes, and values related to eliciting philanthropic responses from donors?

Task analysis of work of fund raisers and others engaged in work related to fund raising:

What are the principal tasks addressed by fund raisers (e.g., annual fund directors, planned giving officers, etc.) and other related personnel (e.g., alumni program coordinators, publication specialists, etc.)? What portion of their time is devoted to each principal task? Do these tasks and time commitments vary by institutional type? Are there geographic differences in task and time expended? What is the relationship between criteria of success (dollars raised, number of donors, etc.) and time expended on various tasks of fund raisers?

Surveys of career mobility of fund raising personnel:

From what fields or vocations do educational institutions recruit fund raising personnel? What other fields or vocations seek to recruit fund raising personnel from educational institutions? What factors are associated with movement from one educational fund raising position to another? What factors are associated with moving from an educational fund raising position to one in another field or vocation? What is the relationship between age and gender and mobility in the field? To what extent do fund raisers move to college/university presidencies and other top management positions in higher education?

Evaluation studies of the effectiveness of fund raisers:

What methods are used to determine the effectiveness of fund raisers? Do these methods differ according to type of institution? What criteria are used in evaluating effectiveness? Who determines the criteria? How are they applied? How is evaluation of effectiveness related to reward? To job mobility? What is the impact of performance evaluation on careers of fund raisers?

Surveys of job satisfaction of fund raising personnel:

What are the elements of job satisfaction and dissatisfaction expressed by fund raisers? What priority do they assign to these elements? Is job dissatisfaction a significant element in decisions of fund raisers to seek a new position? To what extent are fund raisers independent or autonomous workers and is the degree of autonomy they experience a negative or positive factor in their job satisfaction/dissatisfaction?

Career path studies of fund raisers and others in related positions:

How do fund raisers become interested in fund raising? What early life, work, or educational experiences contributed to this interest? What entry points mark their initial work opportunity in the field? What "basic training" experiences introduce them to the work of fund raising? What professional development activities do they engage in and how has this contributed to their career advaneement? What has been their progression through jobs within the field? Do the career paths of fund raisers differ according to the type of institution in which they work? What is the extent of, and the motivation for, movement from educational fund raising to similar positions in other nonprofit organizations? Is there a reverse movement and, if there is, what is the extent of, and the motivation for, that movement?

The Management of Fund Raising

Organizational studies of the manner in which fund raising efforts are structured and managed:

What are the comparative advantages and disadvantages of centralized as opposed to decentralized fund raising structures in complex institutions? Is there a relationship between organizational structure

and fund raising effectiveness? What are the mechanisms in complex institutions for exercising control (e.g. assignment of prospects, etc.), providing services (e.g., prospect research, etc.), and accountability (e.g., evaluating performance)?

Follow-up studies of philanthropic activities that document results of gift seeking and gift making:

How do gift making organizations track the gifts or grants that they make and what are their expectations for reporting and accountability? What do gift seekers do when their proposals are not funded by a gift making organization? What happens to a project or program that has been supported by a gift or grant after the funds are expended? Is there a relationship between the requirement of an institutional contribution to a funded program and the continuation of that program later after external funding is expended? What impact does a substantial gift or grant have on the person or academic unit that seeks and receives the funds? Does securing a substantial gift or grant influence individual or institutional ability to attract subsequent gifts or grants?

Content analysis of materials written and produced to support fund raising:

What elements of theme, format, writing style, tone, and appearance contribute to the appeal and effectiveness of brochures, solicitation letters, newsletters, alumni magazines, campaign booklets, case statements, etc., which directly or indirectly seek to stimulate positive donor response? What is the relationship between these elements and some criteria of success in fund raising? How do such materials differ among institutions of varied types? Are there qualitative differences between materials produced in-house and those produced by outside contractors?

Causal-comparative studies of the influence of specific fund raising programs on other programs conducted by the same institution:

What is the relationship of participation rate in annual fund programs to the dollar yield of other fund raising programs (e.g. capital campaigns, planned gifts, corporate support, etc.)? What effect does the success or lack of success in attaining a capital campaign goal have on other fund raising programs? How does receipt of an

unusually large single gift impact on other fund raising programs operated by the institution? How does the interim between capital campaigns relate to attainment of goals in subsequent campaigns? How does the interim relate to dollar yield of ongoing fund raising efforts?

Cost-benefit studies to ascertain appropriate levels of fund raising overhead:

What variation exists in the cost of raising money by type of program (annual fund, capital campaign, etc.)? Do costs vary according to the type of institution (community college, liberal arts college, research university, comprehensive public college)? Are there geographic differences in the cost of raising money? Does the "maturity" of the fund raising unit relate to the cost of raising money? Does the organization and staffing of the fund raising unit relate to the cost of raising money? Is there a relationship between the proportion of institutional administrative costs devoted to fund raising and the cost of raising money? How does the presence or absence of an institutional foundation relate to the cost of raising money? What are the comparative costs of fund raising programs operated by different units (e.g., annual fund as an alumni association program or as a program of the development office)?

Descriptive studies of the involvement of fund raising counsel in institutional fund raising programs:

What is the relationship between type and size of institution and employment of professional fund raising counsel? What is the extent of involvement of professional fund raising counsel in specific fund raising programs (annual fund, capital campaigns, planned giving, etc.)? How does this differ by type and size of institution? What is the organizational affiliation of fund raising counsel employed (e.g., self-employed, staff member in consulting firm, fund raiser from another institution, etc.)? What tasks were performed by fund raising counsel? What consulting fees were incurred through use of fund raising counsel, categorized by type and size of institution, organizational affiliation of counsel, and tasks performed? How do institutional fund raisers evaluate the advice and products of fund raising counsel and how are the services of the counsel utilized? What are the perceptions of fund raising counsel regarding the most effective manner in which institutional fund raisers can utilize their services?

Policy studies of national, state, and institutional regulations that affect fund raising:

How do changes in federal and state income tax regulations affect gifts to institutions of higher education? How are attitudes of donors or potential donors influenced by tax regulations and actual or proposed changes in these regulations? Is there a relationship between state-by-state variations in inheritance laws and charitable giving to colleges and universities? How do state laws and budget policies affect the ability of institutions of higher education, particularly those in the public sector, to attract and utilize charitable gifts? What impact, if any, do policies and practices of statewide governing and coordinating boards have on institutional efforts to attract and utilize charitable gifts? What internal institutional policies (e.g., overhead rates, coordination of foundation solicitation, auditing practices, etc.) impinge on seeking and attracting charitable gifts?

Application of market research techniques to fund raising:

What are giving preferences of potential donors and how can they be effectively identified? What techniques are most effective in segmenting the pool of potential donors and for relating groups of donors to specific fund raising programs? What types of fund raising appeals are most effective with various segments of the potential donor pool? Does the degree of effectiveness vary according to size and type of institution or geographic location of institution? What are the preferred techniques for conducting feasibility studies for fund raising? What is the relative quality and usefulness of feasibility studies conducted by internal staff as compared to those conducted by outside consultants?

Comparative case studies that contrast institutional environments and structures for fund raising at different types of institutions or systems of higher education within a given state or region, or across states or regions:

What is the relationship between type of institution (or system) and structure for fund raising? Between type and programs employed for fund raising? Do criteria for measuring success vary across types of institutions? How does planning for fund raising vary?

Case studies of fund raising in individual institutions or higher education systems with varied missions (teaching oriented; research university), programs (two-year or four-year), control (public, independent or church-related), and governance (single campus, multi-campus system, or state-wide system):

What is the historical, cultural, economic, geographic, and political context? Who are the clients and constituents? What is the administrative structure? What is the structure for fund raising and institutional advancement? What is the track record for fund raising? Who are the principal actors in the institution and what are their roles? What are the institutional (system) strengths and weaknesses? What is the planning process?

Validation studies to identify criteria for evaluating fund raising effectiveness:

What are the most useful criteria for judging fund raising effectiveness in the view of the fund raisers, institutional administrators, grantgiving organizations, and individual donors? Do these criteria differ according to the type of institution involved, geographic location, maturity of the fund raising program, or size of donor base. What are commonly accepted performance indicators that might be applied to the work of individual fund raisers? Do these indicators vary by type of institution?

Analysis of planning activities associated with fund raising:

What is the relationship between institutional long-range planning efforts and fund raising in higher education? Does this relationship differ among varied types of institutions? How are fund raisers involved in developing institutional plans? To what extent do institutional priorities identified in long-range plans determine fund raising priorities of institutions? What planning steps do fund raisers take in designing various types of fund raising activities (e.g. annual fund, capital campaigns, planned giving programs, etc.)? What planning skills are required in designing these programs? What commitments of staff and internal resources are devoted to planning such programs? How are fund raising counsel involved in planning?

Case studies of specific fund raising programs or techniques (annual fund, telefund, capital campaign, etc.) conducted by cohorts of institutions (independent colleges, two-year colleges, general state colleges, etc.):

What characterizes these programs at a given type of institution? What resources were applied in these programs? What criteria were used in measuring success? What is the relationship between resources and success of the effort?

Appendix

Toward a Network: Problems and Opportunities in Fund Raising Research

by Harvey K. Jacobson
Professor of Journalism
University of Wisconsin-Oshkosh

Problems

The problem setting. Organized fund raising is a relatively new, highly complex function in nonprofit organizations. It operates at the boundary between art and science, experience and guesswork, "copycatism" and experimentation. From the seasoned administrator to the fledgling neophyte, fund raising practitioners desire to know more about the "odds for success." Needed are standardized ways of evaluating effectiveness of fund raising programs. A program of systematic studies could produce findings for building reliable and comparable data banks. Assembled information would contribute to a body of knowledge to help organizations make better use of scarce resources and to assist fund raisers in their quest for professionalism.

Problem identification. The basic problems are inadequate research management and inadequate application of research.

Illustrative of problems in research management are these: Decentralized and uncoordinated research resources that frustrate a growing number of potential users seeking diversified information; underdeveloped management information systems that result in high staff turnover, waste and inefficiency; lack of coordination of research activities, resulting in redundancy, findings of marginal quality, uneven standards of dissemination, and inability to locate and obtain meaningful, relevant and understandable reports.

Illustrative of problems in application of research are these: Inability to identify the "universe" of sound research information on fund raising; lack of indexing and classification systems to provide com-

patibility and to facilitate searches; lack of understanding of managers as to the use and value of scientific information; lack of standardization of descriptors, languages and data base structures; lack of financial support for improvement in the application of research findings to managerial decision making.

Opportunities

Build a network. Current interest in research on fund raising suggests this is an appropriate time to establish a Fund Raising Research Network (FRRN) as an organizing framework for the improvement of fund raising research. FRRN could be developed to serve as a meeting ground where individuals and units with diverse interests come together to benefit from sharing their resources while maintaining their autonomy.

Accept an evolutionary conceptual framework. We need to develop a conceptual framework of theory and research that is powerful enough to critically examine the process of fund raising and develop a body of knowledge that is transferable and scientifically based. The framework should be evolutionary, allowing for input, growth, revision, refinement and change. It takes time, patience and direction for standardized procedures to emerge and reach widening circles of adoption.

Identify the principal interest groups. This should be a cooperative effort that accommodates at least three groups: *Users*, who are primarily fund raising practitioners; *Providers*, who are qualified researchers; and *Policymakers/Facilitators*, who can enable users and providers to interact productively. Initially, we should identify persons and groups interested in being involved, including organizations interested in serving as centers/sites for research, in providing input into policy and program development, and in giving moral and financial support.

Clarify the network goals. The basic purpose of the network is to promote organizational effectiveness of the member organizations, and to provide leadership as a national resource for advancing the professionalism of fund raising through high quality research.

Organize. To address the research management problem we need to organize for effective leadership. One possibility is the appointment of a research council composed of users, providers and

policymakers/facilitators. The council could coordinate efforts of all groups, maximize the services to FRRN participants, encourage high standards and quality control, help improve internal management practices and fund raising reporting, and promote basic operational principles such as access, accountability and disclosure. The council could also develop feedback systems essential to environmental monitoring and anticipation of future FRRN needs. The user representatives will bring to the attention of the council the problems of practitioners which might be solved through research programs. The provider representatives will propose and monitor research standards, determine the feasibility of research proposals, and provide expertise for the execution of research programs and projects. The policymaker/facilitator representatives will identify goals, and develop short-term and long-term plans for achieving them.

Implement a linkage program. To address the application of research problems, we need to develop a linkage program to build systematic interactions between research users and providers. A helpful framework is provided by Jack Rothman of the University of Michigan (*Using Research in Organizations*, Beverly Hills: Sage, 1980). Rothman's studies suggest four major components of effective relationships for achieving change. They are: structural, such as joint appointment of users and providers to committees; the research process and procedures; attitudinal, such as administrative support of guidelines; and research reports and products.

Clarify the research emphases. Another initial task will be to specify the kinds of research to be given primary attention. Basic? Applied? Descriptive? Exploratory? Developmental? Policy research? Should FRRN stress the *generation* of knowledge about the fund raising process or facilitate the *application* of research? Does FRRN wish to put equal weight on gathering, analyzing and reporting research?

Select programming priorities. It also will be necessary to determine priorities for FRRN action. Possible areas for programming are:

- Serve as a storehouse of data.
- Act as a clearinghouse of information (communication broker).
- Commission studies of needs, resources, topics.
- Develop publications or sections of existing publications for dissemination of fund raising research.
- Cooperate with state, national and international organizations for united educational efforts.

— Advise on curriculum development of fund raising management programs in colleges and universities.
— Build consensus on fund raising research issues.
— Provide a mechanism through which FRRN can interact with other data collection and dissemination entities, developing liaison with CASE, AGB, CFAE, Independent Sector, NCHEMS, campus centers of higher education research, and others.
— Develop demonstration projects.
— Provide technical assistance and educational programs in research and research utilization.
— Issue a monograph describing the state of the art of fund raising research.
— Develop and maintain an agenda of research in process and research topics needing investigation.
— Develop and maintain an agenda of FRRN service activities.
— Generate long-term financial support.
— Provide a continuing evaluation of the impact of FRRN activities and products on the improvement of the field of fund raising.

Individuals and groups are invited to offer comments and take initiatives on the topics outlined here. The possibilities for progress are encouraging if we are willing to share ideas, information and resources.